



COUNTY OF SAN DIEGO
Great Government Through the General Management System – Quality, Timeliness, Value
DEPARTMENT OF HUMAN RESOURCES

CLASS SPECIFICATION

UNCLASSIFIED

RETIREMENT ASSISTANT ADMINISTRATOR

Class No. 000287

■ CLASSIFICATION PURPOSE

To plan, organize and direct administrative and operational activities for a major division of the San Diego County Employees Retirement Association (SDCERA); and to perform related work.

■ DISTINGUISHING CHARACTERISTICS

Positions in this class are allocated only to the SDCERA Finance and Accounting Division or Member Services Division and report directly to the Retirement Chief Executive Officer. Under general direction, incumbents have significant responsibility for formulating operational procedures and administering the County Employees Retirement System benefits or pension trust funds.

■ FUNCTIONS

The examples of functions listed in the class specification are representative but not necessarily exhaustive or descriptive of any one position in the class. Management is not precluded from assigning other related functions not listed herein if such duties are a logical assignment for the position.

Essential Functions:

These apply to both options

1. Carries out policy direction.
2. Responds to and provides staff support to the nine-member Retirement Board.
3. Ensures operations are within applicable federal, state and local retirement fund regulations.
4. Prepares scope of work specifications and administers contract agreements with consultants, vendors, and custodial banks.
5. Analyzes and makes recommendations regarding pending legislation.
6. Obtains legal opinions.
7. Establishes and evaluates operating processes and implements changes to policies, procedures, forms and guides.
8. Coordinates work with other agencies, organizations and departments.
9. Establishes business plans.
10. Prepares annual division budget and operates within established funding.
11. Plans and evaluates the application of information technology.
12. Manages employee performance.
13. Coaches and supervises assigned staff including hiring, training, discipline and counseling.
14. Prepares comprehensive cost projections, summaries, reports and recommendations.
15. Provides responsive, high quality service to County employees, representatives of outside agencies and members of the public by providing accurate, complete and up-to-date information, in a courteous, efficient and timely manner.

Finance and Accounting Option

Essential Functions:

All the functions listed for both options and

1. Plans, directs, organizes, coordinates, and evaluates the activities of the Finance and Accounting Division.
2. Establishes controls and accounts, and audits employer/employee benefit contributions, portfolio investments and expenses paid from the retirement trust fund.
3. Prepares the annual operating budget and the Comprehensive Annual Financial Report for SDCERA.
4. Oversees the preparation of estimates and reconciliation.
5. Reports assets and liabilities resulting from security transactions.
6. Prepares reports and schedules summarizing and forecasting fund status, financial activity, actuarial reports and status in terms of income, expenses, and earnings based on past, present and anticipated investment activities and operations.
7. Evaluates fund and investment contractor performance.
8. Conducts complex audits.

Member Services Option

Essential Functions:

All the functions listed for both options and

1. Plans, directs, organizes, coordinates, and evaluates the activities of the Member Services Division.
2. Manages the retirement benefits program for current, deferred, and retired employees and their beneficiaries.
3. Oversees benefit administration and payroll disbursement systems, death benefits, and retiree health plans, and processes domestic relation orders for community property divisions.
4. Confers with counsel in preparing cases for litigation.
5. Oversees communications with members enrolled in the retirement plans and payroll units.
6. Oversees training and retirement planning seminars for members of the retirement association.

■ KNOWLEDGE, SKILLS AND ABILITIES

Knowledge of:

- Current federal and state regulations and statutes governing pension benefits.
- Fiscal, actuarial and cost projection principles and procedures.
- Budget development and administration.
- Employer group insurance and indemnity plans.
- Contracting processes and contract administration.
- Employee supervision, evaluation and training principles and techniques.
- Principles and theory of public administration including human resource management and fiscal management.
- Current trends and management of information technology.
- The General Management System in principle and in practice.
- County customer service objectives and strategies.

Skills and Abilities to:

- Analyze and propose legislation relating to pension management.
- Administer and manage the custody and disbursement activities of retirement monies and benefits.
- Interpret and apply contract provisions and federal, state, and county regulations.
- Prepare executive-level correspondence, reports, narrative, and fiscal and budget documents for public officials, board members, managers and the general public.
- Supervise, train, and evaluate the work of subordinate staff.
- Prepare and give public presentations on the department's activities, functions, and issues.
- Establish and maintain effective working relationships with those contacted during the course of work.
- Represent the Retirement Association by fielding questions at public meetings of elected or board appointed commissions.
- Communicate effectively orally and in writing.
- Establish effective working relationships with management, employees, employee representatives and the public representing diverse cultures and backgrounds.

■ EDUCATION/EXPERIENCE

Education, training, and/or experience that demonstrate possession of the knowledge, skills and abilities listed above. An example of qualifying education/experience is: a bachelor's degree; AND five (5) years of experience in a supervisory or senior-level management position with responsibility for directing accounting and fiscal controls or member services for an employment benefit program or pension plan.

Finance and Accounting:

Experience should include investment accounting related to pension benefits, bonds, commodities, equities, currency and investment portfolios; auditing, fund and investment performance; financial reporting for pension expenditures, expenses and liabilities, note disclosures, and required supplementary information. A Certified Public Accountant (CPA) certificate is desirable.

Member Services:

Experience should include managing the benefits section of a pension plan with responsibility for enrollment and disbursement processes and human resources information systems. Certification as an Employee Benefits Specialist (CEBS) or CALAPRS advanced training is desirable.

■ SPECIAL NOTES, LICENSES, OR REQUIREMENTS

License

A valid California class C driver's license, which must be maintained throughout employment in this class, is required at time of appointment, or the ability to arrange necessary and timely transportation for field travel. Employees in this class may be required to use their own vehicle.

Certification/Registration

None Required.

Working Conditions

Office environment; exposure to computer screens. Out of County travel may be required to attend professional conferences and meetings with contractors and consultants.

Background Investigation

Must have a reputation for honesty and trustworthiness. Misdemeanor and/or felony convictions may be disqualifying depending on type, number, severity, and recency. Prior to appointment, candidates will be subject to a background investigation.

Persons serving in positions in the Unclassified Service do not accrue tenure and serve at the pleasure of the appointing authority (Charter of the County of San Diego Section 909.2).

**New: March 28, 1997
Retitled: August 10, 2001
Reviewed: Spring 2003
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Retirement Assistant Administrator (Class No. 000287)

Union Code: NA

Variable Entry: Y